

Private Markets Platform

BMO Family Office

Historically, Canadian Ultra-High Net-Worth (UHNW) individuals have been under allocated to private markets due to lack of accessibility, and tax or structuring challenges. BMO Family Office leverages cross-border expertise and provides access to the top performing global investment managers to Canadian clients. BMO Family Office can help clients build an institutional quality private market portfolio that becomes self-funding, provides exposure to high quality managers, and has the potential to generate strong performance without taking undo risk.

Exclusive Access

Opportunity to access institutional mandates at attractive minimums, only available to BMO clients

Consistent Product Pipeline

Building an institutional quality private markets portfolio through regular access to deal flow

Deep Research Expertise

Our cross-border Private Markets Research team has over 15 years experience recommending top caliber strategies

Canadian-Friendly Investment Vehicle

Canadian feeder vehicle structures designed to minimize tax and structuring burden, while providing access to top performing global investment managers

Independence & Objectivity

Independent advice and extensive due diligence, approving less than 2% of strategies reviewed

Investment Planning

Endowment style investment deployment designed to minimize risk and achieve desired asset allocation mix

BMO Family Office seeks to combine these key differentiators to provide clients with institutional level access to private markets vetted by an established team. Clients receive exclusive access to products with a comprehensive deployment plan, to help ensure they achieve their target allocation over a reasonable time horizon while minimizing concentration risks. All investments are designed to have a unique access point while reducing the structuring burden for Canadian investors.

If you are interested in learning more about BMO Family Office's Private Markets platform and how they can enhance your investment strategy, please reach out to your BMO Private Wealth representative.



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